

Rethinking Service in Technical Services

Discovering Best Practices for Public-facing Roles

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So, my main purpose today is to spend more time talking *with* you, than *at* you -- to facilitate a discussion that will hopefully inform my research as well as speak to your interest in attending this session on the public facing roles of technical services professionals.

Introduction

“For public services librarians and technical services librarians to effectively support each others’ efforts, they need to embrace a common set of values and goals”

(Jankowska & Marshall, 2003)

- Public and Technical Services
- Service Communication
- E-resources
- Reference Interview

My research focuses on the intersection of public and technical services in libraries, <CLICK> particularly the role that communication has in that service -- whether that is in the course of workflow within the library or by engaging with the public that the library serves. Fully aware that the strict division between public and technical services are arbitrary, and you will hardly even find them delineated in library organizational structures like this today. But it remains a useful vantage point to explore our responses to the changes that have made those lines more blurred.

<CLICK> My interest in this research comes from my background as an e-resources librarian at KU Libraries, which actually at one time had two electronic resource librarians. Both were positioned within technical services (cataloging, content development, and acquisitions) of our library. In these roles, there was increasing collaboration between technical and public (or access) services. This introduced new communication needs not just in those new internal collaborations, but new communication in a service context directly with the public. Traditional public services has a long-established method for communicating within the service context <CLICK> -- the reference interview. Technical services, on the other hand, does not yet have an established communication method for these increasingly service-oriented roles.

Outline

➤ME

- Public-facing technical services roles and service/training models

➤YOU

- Experience in public-facing technical service roles and **how's that working for you?**



What I'd like to do is just cover a few of the kinds of public facing roles traditionally experiences by technical service professionals and the models (like the reference interview) that speaks to the interaction and communication aspect of those roles. Most of our time will be left to the Q&A, in order to understand how you <CLICK> are currently experiencing this in the day to day.

Roles

- Reference Desk Shift
- E-resources Troubleshooting
- E-resources PR
- Metadata consultation
- Discovery Web Usability
- Information Literacy
- **Others?**

“Technical services librarians can determine and affect how patrons are searching for information and how well they succeed in finding it. By understanding the library’s approach to **information literacy, technical services librarians** can also measure collection development efforts to align them with trends and successes in information literacy.”

(Turner & Nann, 2014)

Many technical services librarians began public facing roles by participating directly on the reference desk. **<CLICK>**As questions coming to the desk were more technical in nature, e-resource librarians or staff fielded these questions, either in their role on the desk or through a referral. The collaboration between public and technical services in managing the learning curve of those more technical questions often involved communicating about new e-resources, advertising new trials, gathering feedback on trials, and providing instruction in the use and troubleshooting of e-resource platforms.

<CLICK>Further shifts in libraries’ services and organizational structure came with introduction of *data services*, where metadata specialists worked directly with researcher to front load planning of the research data structure, organization and management. Catalogers are naturally closely tied to those metadata services as well as to the metadata of discovery systems for ensuring findability (their technical side).

<CLICK>But the design of those systems and other web services increasingly relies on usability (the public side). **<CLICK>** And Turner and Nann argue that the skills developed in these transitioning services extend naturally to information literacy efforts.

Models

- Reference Interview (Dervin & Dewdney, 1986)
- Data reference interview (Partlo, 2010)
- Usability Testing (Nielson, 2003)
- Service philosophy (DeLong, et al., 2017)
- RUSA Guidelines
- NASIG Core Competencies of ERL

The reference interview – influenced by research in sense-making and neutral questioning techniques (Dervin & Dewdney, 1986) -- remains a relevant and established tool used in training programs for staff working in reference services. Partlo has adapted it for use in data consultations and we can look to Nielson as a primary source for guidance in the areas of usability testing. Other than these practical applications, what have more philosophical approaches, guidelines, or competencies, but lack a comprehensive set of tools that would embrace our increasingly similar values and goals.

Q&A Discussion

Q: What have you found contributes to a successful technical/public service interaction?

Q: What have you found most challenging in technical/public service interaction?

Please share your current role:

And any of the following tech/pub service roles you've experienced:

- ☐ Reference Desk Shift
- ☐ E-resources Troubleshooting
- ☐ E-resources PR
- ☐ Information Literacy
- ☐ Metadata consultation
- ☐ Discovery/Usability
- ☐ **Others?**

Considering these models and your experience in public facing roles, I welcome your feedback on these questions. I've provided a copy of this slide that you can write in your responses and leave that on your chair. But please feel free to come to the mic and share your current role and any of the roles listed here that you've experienced. I'd also love to hear about other roles and models I've not yet covered.

The question I have for you as you consider these changing roles are:

Q: What have you found contributes to a successful technical/public service interaction?

Q: What have you found most challenging in technical/public service interaction?

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